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Foreign Agricultural Service Washington D.C.



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COFFEE
FCOF 1-65
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CURRENT SERIAL RECORDS

1964-65 COFFEE ESTIMATES

DOWN SLIGHTLY

The Foreign Agricultural Service's third estimate (December) of the 1964-65 world coffee crop places total production at 51.9 million bags, with exportable production at 37.6 million bags, or down slightly from the September estimate. The principal reason for the slight decrease is a lowering of the production estimate for Brazil to 10.0 million bags.

The Foreign Agricultural Service continues to emphasize that the term "exportable production," as used in its coffee reports, is the difference between total harvested production and domestic consumption, and is not synonymous with the production of export-quality coffee. Thus, the exportable production figure for Brazil is placed at only 3 million bags (domestic consumption is estimated at 7 million) even though the major part of the small 1964-65 crop was of good export quality. Nor does the figure include any stocks of exportable coffee from a previous crop being held in a country.

Production

North America: Total North American coffee production is estimated at 10.3 million bags, with exportable production at 7.4 million. This is down from the respective figures for 1963-64 of 10.8 and 8.1 million bags.

Costa Rica's production has been revised slightly upward, but still will be sharply below 1963-64 because of the previously reported damage from volcanic ash and insects, and a prolonged drought early in 1964.

This circular contains more detailed information than the summary of similar title published in the World Agricultural Production and Trade Statistical Report of December 1964.

GREEN COFFEE: World total production for the marketing year 1964-65 with comparisons 1/

Continent and country	Average 1955/56- 1959/60	1961-62	1962-63	1963-64	3rd estimate 1964-65
	1,000 bags <u>2/</u>	1,000 bags <u>2/</u>	1,000 bags <u>2/</u>	1,000 bags <u>2/</u>	1,000 bags <u>2/</u>
North America:					
Costa Rica	734	1,140	1,050	1,100	720
Cuba	713	800	650	475	550
Dominican Republic	549	600	570	650	650
El Salvador	1,436	1,900	1,650	1,940	1,875
Guatemala	1,357	1,700	1,900	1,775	1,650
Haiti	600	725	675	625	600
Honduras	321	365	410	395	420
Mexico	1,716	2,350	2,200	2,900	2,800
Nicaragua	376	440	505	450	525
Panama	<u>3/</u> 27	85	73	85	90
Trinidad & Tobago	44	42	60	75	80
Other <u>4/</u>	427	392	416	325	345
Total North America	8,300	10,539	10,159	10,795	10,305
South America:					
Brazil	28,300	35,000	27,000	26,000	10,000
Colombia	7,360	7,800	7,500	7,800	7,900
Ecuador	521	850	800	750	850
Peru	324	710	770	800	820
Venezuela	835	750	850	900	950
Other <u>5/</u>	63	101	124	128	123
Total South America	37,403	45,211	37,044	36,378	20,643
Africa:					
Angola	1,443	2,800	3,100	2,800	3,100
Burundi <u>6/</u>	---	---	300	150	200
Cameroon <u>7/</u>	405	835	825	850	875
Central African Republic	<u>3/</u> 41	145	105	185	150
Congo (Leopoldville)	1,195	900	1,100	1,100	1,000
Ethiopia	1,100	1,430	1,490	1,525	1,550
Guinea	<u>8/</u> 114	235	215	175	200
Ivory Coast	2,130	1,650	3,350	4,350	3,500
Kenya	415	525	635	740	800
Malagasy Republic	902	800	1,000	900	1,000
Ruanda-Urundi <u>9/</u>	<u>10/</u> 120	460	---	---	---
Rwanda <u>6/</u>	---	---	200	125	125
Tanzania <u>11/</u>	375	400	470	575	575
Togo	122	172	177	255	225
Uganda	1,508	1,945	2,945	2,800	2,900
Other <u>12/</u>	332	316	400	410	407
Total Africa	10,202	12,613	16,312	16,940	16,607
Asia and Oceania:					
India	712	765	930	1,145	1,135
Indonesia	1,343	1,850	2,330	1,900	2,200
Philippines	199	680	550	535	560
Yemen	88	90	82	80	80
Other <u>13/</u>	179	295	280	319	337
Total Asia and Oceania	2,521	3,680	4,172	3,979	4,312
World total production	58,426	72,043	67,687	68,092	51,867

1/ The coffee marketing season begins during the second half of the calendar year, starting in some countries like Brazil as early as July 1 and in other countries about October 1. 2/ 132.276 pounds each. 3/ 2-year average. 4/ Includes Guadeloupe, Hawaii, Jamaica, Martinique, and Puerto Rico. 5/ Includes Bolivia, British Guiana, Paraguay, and Surinam. 6/ Prior to 1962-63 shown as Ruanda-Urundi. 7/ Beginning with 1961-62 includes West Cameroon. Prior to 1961-62 this area was identified as Southern Cameroon and its production was included with Nigeria. 8/ 3-year average. 9/ Prior to 1959-60, Ruanda-Urundi shown in Congo (Leopoldville). Beginning 1962-63 shown as Burundi and Rwanda. 10/ 1 year only. 11/ Prior to 1964-65 year was shown as Tanganyika. Now includes Zanzibar as well. 12/ Includes Cape Verde, Comores Islands, Dahomey, Gabon, Ghana, Liberia, Nigeria, Republic of Congo, Sao Tome and Principe, Sierra Leone, and Spanish Guinea. 13/ Includes Malaysia, New Caledonia, New Hebrides, Papua and New Guinea, Portuguese Timor and Vietnam.

Foreign Agricultural Service. Prepared or estimated on the basis of official statistics of foreign governments, other foreign source materials, reports of Agricultural Attaches and Foreign Service Officers, results of office research and related information.

GREEN COFFEE: World exportable production for the marketing year 1964-65 with comparisons 1/

Continent and country	Average 1955/56- 1959/60	1961-62	1962-63	1963-64	3rd estimate 1964-65
	1,000 bags <u>2/</u>	1,000 bags <u>2/</u>	1,000 bags <u>2/</u>	1,000 bags <u>2/</u>	1,000 bags <u>2/</u>
North America:					
Costa Rica	658	1,025	930	970	580
Cuba	207	200	50	---	---
Dominican Republic	421	450	420	500	500
El Salvador	1,327	1,800	1,540	1,825	1,755
Guatemala	1,158	1,500	1,700	1,565	1,440
Haiti	435	525	425	380	350
Honduras	262	290	335	320	335
Mexico	1,369	1,500	1,250	1,950	1,800
Nicaragua	334	395	460	405	480
Panama	<u>3/</u> 10	40	19	26	27
Trinidad & Tobago	37	35	53	68	72
Other <u>4/</u>	171	88	122	60	73
Total North America	6,389	7,848	7,304	8,069	7,412
South America:					
Brazil	23,360	28,000	20,000	19,000	3,000
Colombia	6,550	6,800	6,500	6,800	6,900
Ecuador	422	650	570	510	600
Peru	251	570	605	615	620
Venezuela	472	310	370	400	450
Other <u>5/</u>	44	50	73	77	72
Total South America	31,099	36,380	28,118	27,402	11,642
Africa:					
Angola	1,427	2,750	3,050	2,750	3,045
Burundi <u>6/</u>	---	---	295	145	195
Cameroon <u>7/</u>	396	820	805	830	855
Central African Republic	<u>3/</u> 37	140	100	180	145
Congo (Leopoldville)	1,164	850	1,050	1,050	950
Ethiopia	850	1,100	1,150	1,175	1,200
Guinea	<u>8/</u> 105	220	200	160	185
Ivory Coast	2,063	1,600	3,300	4,300	3,450
Kenya	399	505	615	720	780
Malagasy Republic	812	700	900	800	900
Ruanda-Urundi <u>9/</u>	<u>10/</u> 118	390	---	---	---
Rwanda <u>6/</u>	---	---	195	120	120
Tanzania <u>11/</u>	369	390	455	560	560
Togo	121	170	175	250	220
Uganda	1,454	1,933	2,930	2,785	2,885
Other <u>12/</u>	308	284	367	377	374
Total Africa	9,623	11,852	15,587	16,202	15,864
Asia and Oceania:					
India	223	315	370	600	590
Indonesia	1,120	1,650	2,080	1,600	1,850
Philippines	---	---	---	---	---
Yemen	74	80	72	70	70
Other <u>13/</u>	63	150	135	139	147
Total Asia and Oceania	1,480	2,195	2,657	2,409	2,657
World exportable production	48,591	58,275	53,666	54,082	37,575

1/ The coffee marketing season begins during the second half of the calendar year starting in some countries like Brazil as early as July 1 and in other countries about October 1. Exportable production represents total production minus consumption, except for Brazil prior to 1959-60 which was based on "registrations" of current crop minus port consumption and coastwise shipments. 2/ 132,276 pounds each. 3/ 2-year average. 4/ Includes Guadeloupe, Hawaii, Jamaica, and Puerto Rico. 5/ Includes Bolivia, British Guiana, Paraguay and Surinam. 6/ Prior to 1962-63 shown as Ruanda-Urundi. 7/ Beginning with 1961-62 includes West Cameroon. Prior to 1961-62 this area was identified as Southern Cameroon and its production was included with Nigeria. 8/ 3-year average. 9/ Prior to 1959-60, Ruanda-Urundi shown in Congo (Leopoldville). Beginning 1962-63 shown as Burundi and Rwanda. 10/ 1 year only. 11/ Prior to 1964-65 year was shown as Tanganyika. Now includes Zanzibar as well. 12/ Includes Cape Verde, Comores Islands, Dahomey, Gabon, Ghana, Liberia, Nigeria, Republic of Congo, Sao Tome and Principe, Sierra Leone, and Spanish Guinea. 13/ Includes Malaysia, New Caledonia, New Hebrides, Papua and New Guinea, Portuguese Timor and Vietnam.

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El Salvador has another large crop although not quite up to the 1963-64 harvest, which set a record. Present indications are that another large crop will follow the better-than-expected output in 1963-64 in the Dominican Republic; apparently, damage from adverse weather at the beginning of the 1963-64 harvest was not as heavy as previously expected.

Apart from a slight increase in the 1964-65 estimate for Nicaragua and a slight decrease in that for Haiti, total production in the rest of North America is expected to be about the same as estimated in September.

South America: Total 1964-65 production in South America is estimated at 20.6 million bags, with exportable at 11.6 million bags. The latter figure is down more than 50 percent from the second estimate for 1964-65, primarily due to a lower estimate for Brazil.

Brazil's 1964-65 total crop is now expected to total only 10 million bags, as a result of the frost and drought damage mentioned in earlier reports. Registrations are expected to be higher than this, however, because of the registration of some 1963-64 crop coffee that was carried over into this season. Present prospects are for a substantial comeback in Brazilian production in 1965-66, following a good recovery of trees in the principal producing states of Parana and Sao Paulo. The 1964-65 crop in Colombia is now estimated to be slightly larger than that of 1963-64, largely because of favorable weather conditions.

Ecuador's 1964-65 production is expected to be at least as large as its big crop in 1961-62, and it will perhaps reach a record level. Primarily responsible will be absence of the adverse weather conditions of last year. Also, higher prices in the first part of 1964 encouraged both private individuals and the government to give more attention to coffee production.

Higher prices also spurred growers in Peru to greater activity and this, along with favorable weather conditions, has meant another increase in that country's production. Venezuela's production is also up in 1964-65.

Africa: The total production in Africa in 1964-65 is now estimated at 16.6 million bags, compared with 16.9 million in 1963-64. Exportable production will be about 15.9 million bags, compared with 16.2 in the previous year.

Angola's production is up in 1964-65, as had been anticipated. Burundi and Cameroon are also expected to have larger crops. Production in the Central African Republic is estimated at a lower figure than last year, when the weather was especially favorable. Conditions remain uncertain in the Congo (Leopoldville) and production there is expected to be down in 1964-65.

Ethiopia's production is up slightly in 1964-65, as is that in Guinea. The Ivory Coast's production is down considerably, largely because of dry weather. Current efforts toward agricultural diversification in this country are expected to produce a leveling off of coffee production in the near future, perhaps even a slight reduction.

Kenya's production is up slightly in 1964-65. Production in the Malagasy Republic is now expected to be up slightly from the 1963-64 crop, which was lower than previously estimated. Togo's 1964-65 crop is still estimated below the 1963-64 total.

Tanzania (formerly Tanganyika and Zanzibar) is expected to produce at about the same level in 1964-65 as in 1963-64. Rwanda's 1964-65 output is also expected to continue at about the same level as during the previous year. Production in Uganda is estimated to be up in 1964-65.

Asia and Oceania: Total production in Asia and Oceania is estimated at 4.3 million bags in 1964-65, compared with 4.0 million a year earlier. Exportable production is up correspondingly to a level of 2.7 million bags, as compared with 2.4 million in 1963-64.

A prolonged drought early in the year was responsible for a slightly lower output in India in 1964-65, compared with the 1963-64 level. In Indonesia, the 1964-65 crop is now estimated to be up considerably from 1963-64. Continued difficulties in the area have reduced the traditional trade through Singapore in the past year.

In the Philippines better cultural practices are believed to be the principal reason for an increased output in 1964-65. Coffee production in Yemen is estimated at about the same level in 1964-65 as in the year before.

Other Minor Producing Countries: Exportable production from smaller producing countries remains about as reported in October. Malaysian total production in 1964-65 is estimated at 110,000 bags, almost all of which will be consumed domestically. Exportable production estimates for some of the other smaller producing countries for 1964-65 (with comparable 1963-64 data in parentheses), in bags of 132.276 pounds, are as follows: Jamaica 15,000 (17,000); Puerto Rico 30,000 (30,000); Bolivia 20,000 (20,000); Paraguay 40,000 (45,000); Surinam 8,000 (8,000); Dahomey 28,000 (28,000); Gabon 10,000 (10,000); Ghana 48,000 (48,000); Liberia 58,000 (58,000); Nigeria 33,000 (33,000); Congo (Brazzaville) 14,000 (14,000); Sao Tome and Principe 5,000 (5,000); Sierra Leone 65,000 (68,000); Spanish Guinea 110,000 (110,000); New Caledonia 30,000 (30,000); Papua and New Guinea 80,000 (75,000); Portuguese Timor 33,000 (30,000).

World Trade and Developments

World imports during the 1963-64 (October-September) coffee marketing year were somewhat less than previously estimated and stock buildups correspondingly less. This reflects the tapering off of the movement of coffee during the last several months of the 1963-64 season.

World stocks are still at a high statistical level but will drop in 1964-65 as a result of the small crop in Brazil and the consequent lowering of that country's stocks. Whether or not the reduction of Brazilian stocks is a temporary

development remains to be seen; present prospects are for a more nearly normal crop in Brazil in 1965-66.

Coffee prices weakened toward the end of 1964. Prices of Robustas (Ambriz AA's) showed the biggest change by declining from an average monthly level of 41.74 cents per pound (N.Y. spot) in March to an average of 30.27 cents in December. Spot Brazilian Santos coffee moved from a high point of 51.25 cents at the beginning of March to an average of 44.98 cents in December. Central Standard Salvadors dropped from a high of 50.25 cents ex-dock (May/June shipment) in early March, to 45.0 cents (Jan./March shipment) at the end of December. During the same period, spot Colombians were the most stable of all, moving only from an average of 49.79 cents in March to an average of 48.72 cents in December. On January 7, 1965, the New York spot prices of the four types of coffee (Ambriz AA's, Santos, Central Standard Salvadors, and Colombians) were 27.25 cents, 44.25 cents, 45.0 cents, and 47.63 cents, respectively.

Imports of green coffees into the United States from October 1, 1963 through September 30, 1964, totaled 23,274,179 bags, valued at \$1,126,714,504. This compares with 23,898,253 bags, valued at \$940,467,087 during the corresponding period in 1962-63.

According to the U. S. Department of Commerce, total inventories of green coffee in the United States on September 30, 1964, were 4,006,000 bags, or about the same level as a year earlier. Coffee roastings in the United States amounted to 23,008,000 bags during October-September 1963-64, up about 1.9 percent from a year earlier. Included in these totals are roastings for soluble coffee of 3,918,000 bags (green weight), compared with 3,997,000 bags in 1962-63.

The U.S. still does not have final Congressional approval to carry out its importer obligations under the International Coffee Agreement. To still the fears of those who felt that the Agreement could not operate effectively without the full participation of the largest consumer member, however, the United States temporarily put into effect a voluntary system of procedures for complying with its importer obligations. In this way, the United States is demonstrating its intention of living up to the spirit of the agreement pending the reconsideration of enabling legislation by the 89th Congress, which recently convened.

The United States continues to be by far the world's largest importer of coffee, while Brazil holds the first position as exporter. Brazil's exports were somewhat below the country's international quota in 1963-64.

GREEN COFFEE: Exports for specified countries by country of destination, calendar year 1963

(Bags of 132.276 pounds each)

Country of destination :	Angola :	Brazil :	Colombia :	Guatemala :	Ivory Coast :	Mexico :
	<u>Bags</u>	<u>Bags</u>	<u>Bags</u>	<u>Bags</u>	<u>Bags</u>	<u>Bags</u>
Europe:						
Austria	6,250	38,482	513	2,836	11,667	---
Belgium-Luxembourg	108,017	571,961	77,078	39,037	3,850	3,282
Czechoslovakia	---	64,751	37,053	---	---	950
Denmark	7,483	663,721	32,582	4,171	---	3,563
Finland	7,666	489,406	104,205	15,014	---	548
France	---	638,933	37,136	1,668	1,718,633	1,440
Germany, East	---	291,109	35,969	---	---	---
Germany, West	107,133	889,323	780,223	368,430	4,050	113,885
Greece	2,917	138,274	---	---	467	---
Hungary	1,750	56,658	11,583	---	3,367	---
Italy	12,017	1,268,481	64,976	11,845	95,900	2,217
Netherlands	583,467	1,502,103	182,416	99,037	17,550	7,475
Norway	6,650	421,065	27,859	6,311	217	265
Poland	5,000	98,779	28,686	---	---	2,249
Portugal	241,417	---	---	---	---	---
Spain	39,400	117,181	250,394	5,505	26,467	16,933
Sweden	10,850	1,023,036	227,781	20,686	766	292
Switzerland	31,166	175,075	98,292	13,513	13,300	47,675
United Kingdom	24,267	198,862	52,340	9,175	550	263
USSR	---	216,666	---	---	---	---
Yugoslavia	---	137,655	33,334	---	---	6,703
Others	7,117	91,815	3,333	---	1,683	---
Total	1,202,567	9,093,336	2,085,753	597,228	1,898,467	207,740
North America:						
Canada	17,350	356,958	147,711	4,004	12,983	23,329
United States	1,008,133	8,717,186	3,816,517	1,080,805	652,966	876,984
Others	---	71,089	---	---	---	583
Total	1,025,483	9,145,233	3,964,228	1,084,809	665,949	900,896
South America	---	558,056	9,978	---	---	525
Africa	38,316	351,659	1,283	---	416,600	---
Asia & Oceania	7,316	364,784	70,865	10,765	46,567	252
Not specified	267	---	209	196	6,900	---
Grand total	2,273,949	19,513,068	6,132,316	1,692,998	3,034,483	1,109,413

Foreign Agricultural Service

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Coffee: Export value as percent of total exports
1959-63 1/

Continent and country	Year				
	1959	1960	1961	1962	1963
	Percent	Percent	Percent	Percent	Percent
North America:					
Costa Rica.....	50.7	50.5	49.0	55.5	49.7
Dominican Republic.....	13.5	12.0	10.0	11.5	10.6
El Salvador.....	62.9	65.7	58.9	55.5	48.5
Guatemala.....	74.8	69.8	62.8	62.4	49.5
Haiti.....	52.3	51.3	41.0	69.8	36.8
Honduras.....	18.5	18.9	13.0	14.7	17.3
Mexico.....	9.1	9.7	9.0	7.9	4.6
Nicaragua.....	19.2	30.5	25.4	17.1	16.4
South America:					
Brazil.....	60.4	56.2	50.6	52.9	53.1
Colombia.....	84.6	71.7	70.9	72.9	69.4
Ecuador.....	18.1	21.4	15.1	17.8	13.8
Peru.....	5.0	4.3	4.0	4.5	4.7
Venezuela.....	1.1	.8	1.0	.7	.9
Africa:					
Angola.....	38.7	35.0	36.1	43.7	40.1
Congo, Republic of the.....	7.7	13.0	N.A.	3.8	6.8
Cameroon.....	18.7	19.0	21.2	20.4	20.2
Ethiopia.....	56.6	51.0	51.0	53.7	49.7
Ivory Coast.....	47.3	50.0	46.2	39.7	43.1
Kenya.....	23.0	26.0	21.0	28.0	25.1
Malagasy Republic.....	32.0	31.5	29.0	31.9	28.9
Tanganyika.....	12.0	14.0	12.7	12.8	10.8
Uganda.....	39.5	35.2	30.4	53.6	52.8
Asia and Oceania:					
India.....	1.0	1.0	1.1	1.2	1.1
Indonesia.....	2.2	2.3	1.0	1.8	N.A.

1/ The above table is subject to revision.
N.A. = Not available.